



9:28 am, 8/2/24

IN THE UNITED STATES DISTRICT COURT
FOR THE DISTRICT OF WYOMING

Margaret Botkins
Clerk of Court

JOHN MANSKE, YVONNE BANKS,

Plaintiffs,
v. Case No. 24-CV-143-ABJ

ROGER REKATE, ADVISOR ONE LLC,
ADVISOR INK FINANCIAL,

Defendants.

**ORDER REQUIRING JOINT REPORT OF MEETING AND PROPOSED JOINT
DISCOVERY AND CASE MANAGEMENT PLAN
AND SETTING INITIAL PRETRIAL CONFERENCE**

This matter has come before the Court for consideration, and it appears that a scheduling conference with the Court is appropriate and should be held. To that end, it is hereby

ORDERED that the parties shall meet and confer to discuss and prepare a Joint Report of Meeting and Proposed Joint Discovery and Case Management Plan before the Initial Pretrial Conference is held. They shall prepare a Joint Report of Meeting and Proposed Joint Discovery and Case Management Plan, which shall be submitted seven (7) calendar days prior to the date of the Initial Pretrial Conference, in the form attached to this Order.

It is further ORDERED that an Initial Pretrial Conference shall be held on the 28th day of August 2024, at 10:30 a.m., VIA ZOOM from Courtroom 2 at 2120 Capitol Avenue,

Cheyenne, Wyoming. Parties shall be prepared to discuss scheduling and all matters addressed in the Joint Report of Meeting and Proposed Joint Discovery and Case Management Plan. They shall have their calendars available and must be able to commit to deadlines established at the Initial Pretrial Conference by the Court.

The parties are also advised they should become familiar with the Local Rules for the United States District Court of Wyoming and the Court Procedures for the Honorable Alan B. Johnson. These documents are available on the Court's website, <http://www.wyd.uscourts.gov>.

Dated this 2nd day of August 2024.



ALAN B. JOHNSON
UNITED STATES DISTRICT JUDGE

IN THE UNITED STATES DISTRICT COURT
FOR THE DISTRICT OF WYOMING

[Plaintiff(s)],

Plaintiff(s),

vs.

Case No.

[Defendant(s)],

Defendant(s).

**JOINT REPORT OF MEETING
and
PROPOSED JOINT DISCOVERY AND CASE MANAGEMENT PLAN
Under Rule 26(f) of the Federal Rules of Civil Procedure**

(Please restate the instruction in **bold** before furnishing the responsive information.)

**(The parties'23-00168 proposed plan is subject to revision and modification by the
Court at the Initial Pretrial Conference.)**

1. State where and when the conference among the parties required by Rule 26(f) of the Federal Rules of Civil Procedure was held and identify the counsel for each party or any unrepresented *pro se* individual who attended. The name of the participant, address, bar number (where applicable), telephone and fax numbers, and email addresses must be provided.
2. List the cases related to this one that are pending in any state or federal court with the case number and court, and state how they are related.
3. Briefly describe what this case is about.
4. Specify the allegations providing the basis for federal jurisdiction.
5. Name the parties who disagree with the plaintiff's jurisdictional allegations and state their reasons for disagreement.

6. Discuss whether the case is complex. If the parties believe that the case is complex, explain why and be prepared to address this issue, including scheduling and case management considerations, during the Initial Pretrial Conference.
7. List anticipated additional parties that should be included, when they can be added, and by whom they are wanted.
8. List anticipated interventions.
9. Describe class-action issues, if any.
10. State whether each party represents that it has made the initial disclosures required by Rule 26(a). If not, describe specifically the arrangements that have been made to complete the disclosures.
11. Describe the proposed agreed discovery plan, including:
 - a. Responses to all the matters raised in Rule 26(f).
 - b. When and to whom the plaintiff anticipates it may send interrogatories.
 - c. When and to whom the defendant anticipates it may send interrogatories.
 - d. Of whom and by when the plaintiff anticipates taking oral depositions.
 - e. Of whom and by when the defendant anticipates taking oral depositions.
 - f.
 - (i) Specify the date experts for plaintiff (or party with the burden of proof on an issue) will be designated and their reports provided to the opposing party.
 - (ii) Specify the date experts for defendant will be designated and their reports provided to the opposing party.
 - g. List expert depositions the plaintiff (or the party with the burden of proof on an issue) anticipates taking and their anticipated completion dates. See Rule 26(a)(2)(B) (expert report).
 - h. List expert depositions the defendant (or opposing party)

anticipates taking and their anticipated completion dates. See Rule 26(a)(2)(B) (expert report).

- i. Indicate whether the parties have conferred with their clients regarding obligations concerning electronically stored information. Also identify limitations on discovery of electronically stored information, as contemplated by Federal Rule of Civil Procedure 26(b)(2)(B) and the Local Rules of this Court.
- j. Discuss the scope and limits of planned discovery. Identify how the parties will ensure that anticipated discovery will be proportional to the needs of the case, and address each of those considerations set forth in Rule 26(b) regarding the scope of discovery in general.
12. If the parties have not agreed on a part of the discovery plan, describe the separate views and proposals of each party.
13. Specify the discovery beyond initial disclosures that has been undertaken to date.
14. State the date the parties believe planned discovery can reasonably be completed.
15. Describe the possibilities for a prompt settlement or resolution of the case that were discussed during your Rule 26(f) meeting.
16. Describe what each party has done or agreed to do to bring about a prompt resolution.
17. From the attorneys= discussions with the client(s), state the alternative dispute resolution techniques that may be reasonably suitable.
18. State whether a jury demand has been made and if it was made on time.
19. Specify the number of hours it is expected that it will take to present the evidence in this case.
20. List pending motions that could be ruled on at the Initial Pretrial Conference.
21. List other pending motions, if any.
22. Indicate other matters peculiar or unique to this case, including discovery, that deserve the special attention of the Court at the Initial Pretrial Conference.
23. Indicate whether the parties anticipate any amendments to the pleadings.

24. List the names, bar numbers, addresses, email addresses, and telephone numbers for all counsel. List the names, addresses, email addresses and telephone numbers for all parties and unrepresented *pro se* litigants.

Counsel for Plaintiff(s)

Date

Counsel for Defendant(s)

Date

Counsel for Third Party

Date